

# FINANCIAL PLANNING SUPERHERO



# KIDS AT WORK

**GUIDE FOR HOSTING A TAKE-A-KID-TO-WORK DAY  
FOR GRADES K-5**

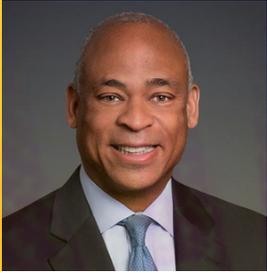


# KIDS AT WORK

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# WELCOME

FROM CFP BOARD CEO

**K. DANE SNOWDEN**

At CFP Board, we believe financial planning is about more than numbers. It's about helping people build lives they care about. Take-a-Kid-to-Work Day offers a meaningful opportunity to introduce young people to the working world, and we're excited to share ***Financial Planning Superhero: Kids at Work***, a guide created in that same spirit.

Research shows that early financial education can make a real difference. Studies have found that children as young as five years old can grasp basic concepts of money and demonstrate saving behavior, and that even modest financial lessons in early grades can improve knowledge, attitudes and behaviors related to money. Early, developmentally appropriate exposure helps lay a foundation for financial capability later in life.

This is where CFP Board comes in. As the organization that sets and upholds the standards for CFP® certification, we are committed to strengthening the profession and expanding access to financial planning for the public. ***Financial Planning Superhero: Kids at Work*** reflects that commitment to supporting firms, empowering families and helping nurture the next generation's understanding of what financial planning is and why it matters.

For families, this day helps bring the profession to life, giving children a window into their parents' work and a clearer understanding of what financial planning professionals do.

To extend the experience beyond the workplace, we've also included an optional At-Home Guide for Parents with simple ideas to continue money conversations and build on what kids explore during Take-a-Kid-to-Work Day.

We hope this guide helps make Take-a-Kid-to-Work Day meaningful, memorable and fun for your firm and the families you serve — and that it inspires the next generation to see how financial planning can make a positive difference in people's lives.

A handwritten signature in black ink that reads "K. Dane Snowden". The signature is stylized and cursive.

# HOW TO USE THIS GUIDE

The activities in this guide are intentionally flexible and hands-on, sparking curiosity, conversation and creativity around money and work. This is not a classroom lesson plan, but rather a menu of experiences you can mix and match based on your space, schedule and the ages of participating children.

Activities from the In-Office Activity Menu can be set up as centers and adapted to fit your office and time frame. A sample schedule is included for easy planning, and each activity link provides everything you need to get started, including suggested materials, set-up steps, printables and where to purchase supplies if needed.

We encourage firms to customize this experience in a way that feels authentic to your firm's culture, people and the families you serve. Whether you host a half-day event, a full-day program or a few core activities, the goal is to make the experience engaging, welcoming and fun.

CFP® professionals who help bring this day to life may count their participation in Take-a-Kid-to-Work Day as eligible pro bono service. We encourage them to log their hours directly in their CFP Board account.

We have curated a special bundle of CFP Board swag available for optional purchase, if you want to offer participants a fun reminder of their day at your office. Please reach out to **Moley Evans** at [mevans@cfpboard.org](mailto:mevans@cfpboard.org) for more information.

You also may want to invest in some toys such as Magna-Tiles, a marble run, plastic animals, Playstix, Crazy Connectors and/or wooden blocks for kids to interact with throughout the day.



## Share Your Day With Us!

We'd love to see how you bring *Financial Planning Superhero: Kids at Work* to life! Email us at [probono@cfpboard.org](mailto:probono@cfpboard.org) to share photos or short videos from your firm's Take-a-Kid-to-Work Day or tag CFP Board in your firm's social media posts.

Please be sure to follow your firm's photo and privacy guidelines and obtain any necessary permissions before sharing.



# SAMPLE SCHEDULE

## **8:30-9:00 a.m. Welcome!**

As participants join, welcome them warmly and have them make Name Tags and Social-Safe Face Covers (page 14). Make sure you have scissors, tape, craft sticks and markers!

Once everyone has arrived, ask the children to sit in a circle and choose a greeting to start your day.

Next, set your rules:

To set effective rules, collaborate with the children to create three simple, positively framed and action-oriented rules.

A question you could ask is: *What can we do here today to make sure everyone has fun and feels safe?*

Three simple rules could be:

1. Use kind and respectful words.
2. Keep your hands and feet to yourself.
3. Take care of the classroom (meeting room) and materials.

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## **9:00-9:30 a.m. Financial Planning Superhero Kickoff!**

Kick off the day with either a read-aloud (choose one of the books from the In-Office Activity Menu) and/or by playing Financial Planning Career Videos featuring stories from CFP® professionals, and/or by playing I am a CFP® Pro videos and/or with a “Financial Planning Superhero Kickoff!”

TIP: If you decide to do a “Financial Planning Superhero Kickoff,” have your “Financial Planning Superhero” dress up in a superhero cape and mask you purchased from one of the craft centers!



# SAMPLE SCHEDULE

## Financial Planning Superhero Kickoff!

### What is a Financial Planning Superhero?



#### Big Idea

“I’m a helper who uses money to make people’s lives better.”

“I help people make smart choices with their money so they can do the things they care about.”

“Some superheroes use strength or speed. I use listening, math and kindness.”

“Everyone needs help sometimes, even grown-ups!”

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### What are the superpowers of a Financial Planning Superhero?



#### Listening Power

“First, I listen to what people want and what they’re worried about.”

“Some people want to buy a house. Some want to help their kids go to college. Some want to take lots of vacations with their families.”



#### Math Power

“I use numbers to make plans.”

“I help people figure out how much to save and how to spend wisely.”



#### Planning Power

“I make a step-by-step plan so big dreams don’t feel scary.”

“We break big goals into small steps.”



#### Helping-Heart Power

“I especially like helping people who are going through tough times.”

“When people feel stressed about money, I help them feel calmer and more confident.”



# SAMPLE SCHEDULE

## Financial Planning Superhero Kickoff!

What real-life “Villains” do Financial Planning Superheroes battle?



### The Overspending Monster

“Wants us to buy everything right now.”



### The Forget-to-Save Goblin

“Tries to make us forget about the future.”



### The Confusion Cloud

“Makes money feel complicated.”

What do Financial Planning Superheroes defeat “Villains” with?





# SAMPLE SCHEDULE

## Financial Planning Superhero Kickoff!

### Simple Story Examples:

*“Once I helped a family who wanted to go to Disney World and also save for college. They thought they could pick only one. We made a plan so they could do both!”*

*“I helped someone who was nervous about running out of money when they stop working. Now they feel safe and excited about the future.”*

### How Kids Already Have Money Superpowers

Connect to their lives: saving birthday money, choosing between toys, helping decide groceries, sharing, etc.

*“Every time you save, plan or think before you spend, you’re training to be a Financial Planning Superhero, too!”*





# SAMPLE SCHEDULE

**9:30-10:00 a.m.**

**Scavenger Hunt**

Find Someone Who... (page 16) or the classic scavenger hunt we suggest on page 11.

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**10:00-10:15 a.m.**

**Snack**

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**10:15 a.m.-12:00 p.m.**

**Centers**

Choose your centers from the games, hands-on activities and crafts we suggest on page 11.

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**12:00-1:15 p.m.**

**Lunch**

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**1:15-2:15 p.m.**

**Same Centers as Earlier or Make Cars for a Drive-In Movie!**

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**2:15-4:00 p.m.**

**Movie**

*The Princess and the Frog* is suggested — you can set it up like a drive-in movie or just watch the movie.

# IN-OFFICE ACTIVITY MENU

## READ-ALOUDS & GUIDES!

[\*The Berenstain Bears' Trouble With Money\*](#)

by Stan and Jan Berenstain (K-2)

[\*A Chair for My Mother\*](#)

by Vera Williams (K-5)

[\*You Can't Buy a Dinosaur With a Dime\*](#)

by Harriet Ziefert (K-5)

[\*Those Shoes\*](#)

by Maribeth Boelts (K-5)

[\*Lilly and May Learn Why Mom and Dad Work\*](#)

by Anthony C. Delauney (K-5)



## GAMES & HANDS-ON ACTIVITIES

[\*Needs vs. Wants\*](#) card game (K-5)

[\*Count Your Chickens!\*](#) (K-2)

[\*Hi Ho! Cherry-O\*](#) (K-2)

[\*Budget Real World Math Game\*](#) (3-5)

[\*The Game of Life\*](#) (3-5) A classic!

[\*Pay Day\*](#) (3-5)

[\*The Spending Shuffle Card Game\*](#) (3-5)

# IN-OFFICE ACTIVITY MENU

## OFFICE SCAVENGER HUNT

[Classic Office Scavenger Hunt](#) (K-5)

**Find Someone Who...** (K-5, starts on page 16 of the toolkit)



## CRAFTS, WORKBOOKS & HANDOUTS

[All Things Finance](#) printable workbook (2-5)

Design your own [play money](#) — Use [National Geographic Kids Everything Money](#) by Kathy Furgang and Fred Hiebert as a resource and be sure to have markers on hand! (K-5)

Make [superhero capes and masks](#) to become a “Future CFP® Pro.” Don’t forget to buy [sticker letters](#) and additional stickers like stars, lightning bolts, etc.

Decorate piggy banks. You can purchase kits [here](#). (K-5)

You may want to end your day with a [drive-in movie](#) and watch *The Princess and the Frog*, which features Tiana working multiple jobs to save for her dream restaurant, highlighting saving, entrepreneurship and avoiding debt.

# GROWING MONEY SMARTS: AN AT-HOME GUIDE

Simple Activities to Continue the Conversation at Home

## BOOKS/RESOURCES

[\*FINRA Book List\*](#) (Birth-Grade 8)

[\*Money Monsters\*](#) downloadable books and parent reading guide (Ages 4 and up)

## ONLINE GAMES & VIDEOS

[\*Financial Planning Career Videos\*](#): Stories from CFP® professionals and college students studying financial planning

[\*Kahoot!\*](#): Online financial literacy trivia

[\*Greenlight Level Up\*](#): Online financial literacy game for kids and teens from budgeting to investing

[\*FDIC's How Money Smart Are You?\*](#): 14 online games on topics such as earning, saving, investing, borrowing, etc.

[\*Sesame Workshop\*](#): Videos for preschoolers

[\*Welcome to Financial Literacy\*](#): Khan Academy for upper elementary and middle schoolers

[\*Twinkl Financial Literacy\*](#) videos: Upper elementary

[\*Financial Football\*](#): Online game created by the NFL and Visa

# GROWING MONEY SMARTS: AN AT-HOME GUIDE

## GAMES & HANDS-ON ACTIVITIES

[Needs vs. Wants card game](#) (K-5)

[Budget Real World Math Game](#) (3-5)

[Count Your Chickens!](#) (K-2)

[The Game of Life](#) (3-5) A classic!

[Hi Ho! Cherry-O](#) (K-2)

[Pay Day](#) (3-5)

## MAKE, CREATE & PLAY

Host a [drive-in-movie night](#) with friends or neighbors

Invite kids to run their own restaurant for the evening. Together, create menus, decide on prices and build a shopping list for ingredients. Kids can dress up as servers, take orders and serve dinner, earning play money for their work while practicing real-world money skills such as planning, pricing and earning.

Set up a [lemonade stand](#) in your neighborhood.

[Family-At-Home Financial Fun Pack](#) from the Council for Economic Education

Make [Save, Spend, Share Jars](#)

## RESOURCES FOR OLDER KIDS

[CFP Board Student Guide to Financial Planning Careers](#)

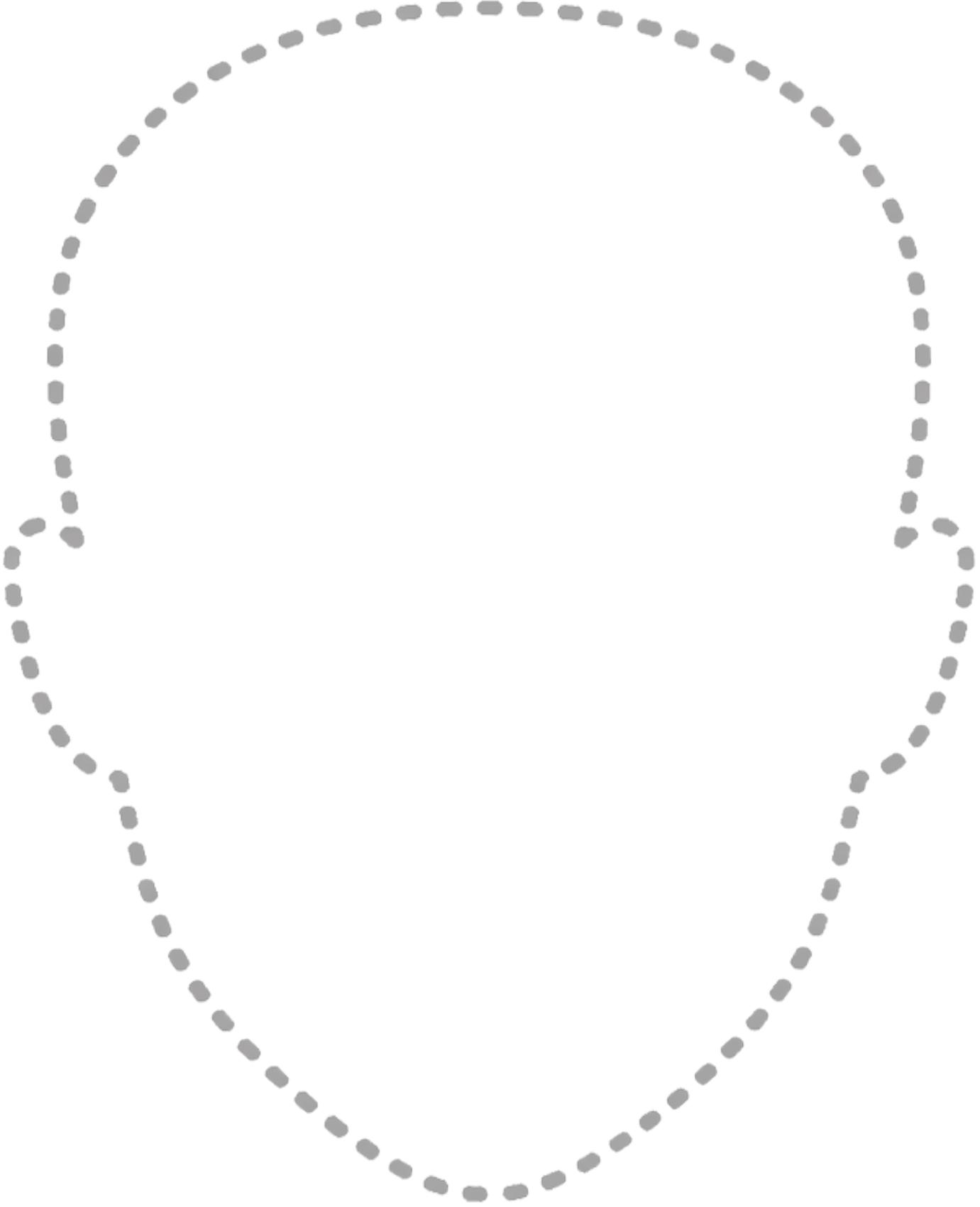
[Financial Planning Career Information Flyer](#)

# SOCIAL MEDIA-SAFE FACE COVER

## Instructions for Future CFP® Pros:

1. Print page 15. It's best to print these on cardstock.
2. Color in social media-safe face cover.
3. Cut out the social media-safe face cover.
4. Tape the social media-safe face cover onto a craft stick.





# Future CFP® Pro Edition

# FIND SOMEONE WHO...

## Instructions for Future CFP® Pros:

1. Walk around the office and talk to adults or volunteers.
2. Ask questions or observe to complete each box.
3. When a box is done, have the person initial it.
4. Once all the boxes are initialed/filled, win a prize!

## Materials:

- Pencils or markers
- Stickers for completed boxes
- Small prizes (chocolate coins, play money, mini piggy banks)
- Worksheets (print pages 16-19)



# Future CFP® Pro Edition

## FIND SOMEONE WHO...

**1 Can tell you what a budget is...**



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Initial here: \_\_\_\_\_

**2 Can name two ways people save money...**



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Initial here: \_\_\_\_\_

**3 Can explain what a financial planner does...**



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Initial here: \_\_\_\_\_

**4 Can show you an example of a credit or debit card...**



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Initial here: \_\_\_\_\_

# Future CFP® Pro Edition

## FIND SOMEONE WHO...

**5** Can tell you the difference between a need and a want...



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Initial here: \_\_\_\_\_

**6** Can name a way people earn money at a job...



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Initial here: \_\_\_\_\_

**7** Can give an example of something people spend money on...



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Initial here: \_\_\_\_\_

**8** Can explain what a savings account is...



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Initial here: \_\_\_\_\_

# Future CFP® Pro Edition

## FIND SOMEONE WHO...

**9** Can tell you one way to plan for a goal (like saving for a toy)...



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Initial here: \_\_\_\_\_

**10** Can circle which item is a need and put an X on items that are a want...



Initial here: \_\_\_\_\_

**11 BONUS:** Can tell you why it's good to save money...



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Initial here: \_\_\_\_\_